

Strategic Plan 2007



Idaho Small Business Development Center Strategic Plan State FY 2006

Background:

The Idaho Small Business Development Center (Idaho SBDC) was established in 1986 as part of a nationwide network created to improve the success of small businesses. The U. S. Small Business Administration, the State of Idaho, the hosting institutes of higher education, and private donations fund the organization.

The Idaho SBDC is a network of business consultants, trainers, and support staff that operate from the state's colleges and universities. Boise State University's College of Business and Economics serves as the host with administrative responsibility for directing the type and quality of services across the state. Regional offices in the following locations are funded under sub-contracts between the host institutions and Boise State University:

North Idaho College - Coeur d'Alene
Lewis-Clark State College - Lewiston
Boise State University - Boise
College of Southern Idaho - Twin Falls
Idaho State University - Pocatello
Idaho State University - Idaho Falls



Services include individualized one-on-one consulting, focused training, and applied research. Staff in these offices are very involved in the business and economic development efforts in their areas and are positioned to respond rapidly to the changing business environment. Ninety percent of Idaho's businesses are within an hour's drive of one of the offices. This allows the Idaho SBDC to effectively and efficiently serve the business community in Idaho.

Mission:

To enhance the success of small businesses in Idaho by providing high-quality consulting and training.

Vision:

To be the primary provider of quality assistance to small business clients, our customers.

Tag Line:

direction solutions impact

Operating Philosophy:

Service is the primary product of the Idaho SBDC. Consequently, the Center must be committed to creating and maintaining a high standard of service. This standard has three cornerstones:

1. **Focus on the Client:** The very future of the Idaho SBDC program depends on creating satisfied clients. To this end, each client contact must be considered an opportunity to focus on client needs and desires. Responding quickly with individual attention to specific and carefully identified client needs, then seeking critical evaluation of our performance, is the routine that will be followed with each client and training attendee.
2. **Devotion to Quality:** Providing consulting and training through a quality process and constantly seeking ways to improve that process are the principles of this cornerstone of service. Fostering teamwork, eliminating physical and organizational barriers that separate people, establishing long-term relationships with partners and encouraging all to participate in quality improvement are some of the actions that demonstrate the Center's devotion to quality.

3. **Concentration on Innovation:** To innovate is to improve through change. The Center must constantly seek ways to improve its methods and processes and assume a leadership role in trying new approaches to serve clients. Regular performance reviews, participation in organizations, and attending professional development workshops are some of the ways that the Center identifies and encourages innovation.

Priorities:

The Idaho SBDC will focus on the following priorities:

1. Add additional resources (people and money).
2. Redirect focus and image to established and high growth business assistance.
3. Develop online and targeted training offerings.
4. Develop specialized programs for women and Hispanics.

Market Segments:

The small business market that the Idaho SBDC serves can be divided into three different segments. With limited resources and the knowledge that in-depth, on-going consulting gives greater returns, this Strategic Plan calls for different approaches to each segment. The Idaho SBDC Marketing Plan also contains additional information about these segments and more specific marketing and services designed for each of these segments.

1. Pre-venture – These potential clients are not in business but have an idea for starting a business. They will be assessed for the level of effort already put into the venture. Very early entrepreneurs will be directed to a variety of information, training, and resources, and asked to return when they have progressed. These pre-venture clients will be 20% of the Idaho SBDC's clients.
2. Established businesses – These potential clients already have an established business. A consultant will meet with them to evaluate their needs and formulate a plan to address them. Within this segment will be some businesses with the potential for high growth (segment 3). The majority of businesses in this category will have 20 employees or less. Eighty percent of Idaho SBDC clients will be in this category.
3. High-growth – These prospective clients generally have the potential for employment growth at the rate of 15% per year or 100% in five years. (This category has been more specifically identified in the Marketing Plan.) These businesses will receive focused long-term services and coaching and be tracked separately. Ten percent of Idaho SBDC clients will be in this category with the majority of these businesses having fewer than 20 employees.

Allocation of Resources:

The Idaho SBDC shifts resources, as appropriate, to achieve the goals of the Strategic Plan. The SBA portion of the Idaho SBDC's budget has remained level since 1998. This has prompted shifting financial resources from operating to personnel to assure that Idaho small businesses receive the same level of service. At this point, the operating budget for the Idaho SBDC is at what is considered a floor for supporting existing personnel and offices. Currently, the annual budget for the Idaho SBDC is distributed as follows:

- ♦ Personnel = 71% of total budget, 90% excluding indirect costs
- ♦ Operating (travel, consultants, supplies, etc.) = 8% of total budget and 10% excluding indirect costs
- ♦ Indirect costs = 21%

In addition to financial constraints, the Operations Manual sets a policy for allocation of time as 60% consulting, 20% training, and 20% administrative. Milestones for each center and minimum hours for consultants and regional directors are based on the time allocation. To maintain service at the existing level, operate within the financial constraints, and meet the time allocation policy, the Idaho SBDC focuses on shifting personnel resources to achieve strategic plan goals. For example, to shift the focus to high-growth companies, strategies were developed to more efficiently serve start-up clients. The time gained through these efficiencies is redirected to work with high-growth clients within the 60% consulting framework. The SBDC will continue to use this model for distribution of resources to achieve the strategic plan goals as long as a constraint remains on operating resources.

Strengths, Weaknesses, Opportunities, and Threats:

Internal	
Strengths	Weaknesses
<ul style="list-style-type: none"> • Communication <ul style="list-style-type: none"> ▪ Monthly conference calls ▪ Critical measures • People in the organization <ul style="list-style-type: none"> ▪ Good teamwork, leadership, cooperation, vision, customer relations ▪ Friendly, resourceful, responsive, nice, entrepreneurial, creative, positive attitude, dedicated, want to work here ▪ Broad experience, diverse expertise, gender diversity ▪ No turf battles, professional network • Good professional development – try to stay on cutting edge • Longevity - established organization, recognized and accepted results, good reputation • Institutional support and people good at maintaining it • Strong partnerships/networking <ul style="list-style-type: none"> ▪ SCORE, WBC, TechHelp, Technology Connection, Idaho Virtual Incubator, Economic development, Chambers, banks, Rotary, etc. • Access to research through state office, ASBDC, and listserv • Serve businesses in a large area • Ahead of most businesses in technology use and knowledge 	<ul style="list-style-type: none"> • Funding • Time – consultants stretched thin • Large geographic areas to cover • Communication between training folks • Mostly reactive vs. proactive in choosing clients • Relationship with college/university and internships • Follow-up on ideas (especially after conference calls) • Ability to pull from statewide expertise and know what others are doing • Bureaucratic processes • Timely feedback to centers/counselors • Recent large staff turn over • How little we're known in some sectors – not everyone goes to the Chamber, visibility in business community • Training attendance and revenue • Success in shifting focus to long-term clients • Clear marketing strategy including frequency of mass mailing to clients • Recognition for clients • No Spanish speakers or Hispanics
External	
Opportunities	Threats
<ul style="list-style-type: none"> • Partnerships – SBA, SCORE, WBC, Chambers, other institutions • Technology - helps makes us more efficient, teach our clients how to use, links offices • Economy – layoffs/shutdowns <ul style="list-style-type: none"> ▪ More businesses will need our help ▪ Need to diversify economy • Added emphasis of “technology” in our name and expertise/service – high-tech/high-growth companies • Finding/attracting existing businesses and nurturing existing entrepreneurs vs. attracting new businesses • Other funding sources – Department of Commerce rural economic initiative, USDA, fire money • Incubators • Watching trends/projections • Venture capital community • Recognition as “the” small business assistance provider • Executive coaching/mentoring trend 	<ul style="list-style-type: none"> • Economy – especially in rural areas <ul style="list-style-type: none"> ▪ Agriculture and natural resource based businesses ▪ Plant layoffs/closures, increase in unemployment ▪ Energy, fire, low-water, other disasters • Funding for SBDC <ul style="list-style-type: none"> ▪ Professional development, operating ▪ Attract and keep quality staff ▪ Afford technology ▪ Time to chase money ▪ State budget challenges (legislature) • Rural areas behind technology curve • Perception of duplication – SBA, SCORE, WBC, Chambers, economic development • Encroachment on our turf - agricultural extension and rural initiative/economic development • Free money events • Potential clients don't know about us and/or don't realize they need us

Goals, Objectives, Strategies, and Measures:

Goal 1: Improve the success of small businesses through delivery of our core services – one-on-one business consulting, training and research.				
Objective 1.1: Increase the impact of consulting assistance by proactively seeking clients appropriate for long-term consulting assistance.				
	Strategies: 1.1.1 Each center and the state will average 8.5 hours per client and maintain or increase in subsequent years. 1.1.2 Each Regional Center will continue to deliver services to prepare pre-venture clients for more effective individualized consulting with a target of 25% of the clients are pre-venture. 1.1.3 Deliver at least one NxLevelL course per region per year. 1.1.4 Support SBA's efforts to develop and/or enhance SCORE assistance with the goal of an active chapter in each region capable of individual consulting with clients. 1.1.5 Each office will set a target of the number of businesses that will participate in using the assessment tool. o Develop standard procedures to be used statewide o Continue to refine and increase the use of the assessment tool.	SD/RD* RD RD RD RD	ongoing ongoing Annually ongoing Annually 12/2006 ongoing	Output measures: • Completing tasks • Average 8.5 hours/client Outcome measure: **
Objective 1.2: Provide research support to help small business owners and managers in decision-making.				
	Strategies: 1.2.1 Each office will fully utilize all research support, including: o SBDC Net (www.sbdcnet.utsa.edu) o ASBDC list serv o American Business Disk o State Office research o Intranet research reports 1.2.2 Each office will maintain a library of business information specifically designed to meet the needs of small businesses.	RD & Mason RD	Ongoing Ongoing	Output measures: • Completing tasks • Number of research projects Outcome measures: ** • Feedback on research
Objective 1.3: Ensure that services are available to minorities and available all counties.				
	Strategies: 1.3.1 Meet the needs and milestones of special focus groups such as women, Hispanics, and veterans o Ensure that at least 100 veteran clients receive services o Ensure that % of women, Hispanic, and minority clients meet the latest percentages for these sectors contained in the Idaho SBDC Marketing Plan. 1.3.2 Hire a bilingual (English/Spanish) business consultant to serve southern Idaho. Seek funding from the State and other public and private sources.	RD SD	Annually 9/2007	Output measure: • % Minority, veteran, and women clients Outcome measure: **

	1.3.3 Assure that allocation of resources and milestones are based on 60% consulting, 20% training, 20% administrative as required in the Operations Manual.	RD*	Annually	
	1.3.4 Meet the milestone established for the # of clients and consulting hours for each county to ensure services to all areas of the state.	RD	Annually	
	1.3.5 Develop and implement a specialized program to serve women entrepreneurs.	All	12/2006 & ongoing	
Objective 1.4: Identify and address the needs of small businesses and entrepreneurs.				
	Strategies:			
	1.4.1 Collect needs information from regional centers, training evaluations and other sources annually.	RD	Annually Feb.	Output Measure: • List of priority needs • Completing tasks on time
	1.4.2 Conduct an online survey to determine small business needs. Incorporate results into needs assessment.	DD	Annually	Outcome measure: **
	1.4.3 Present needs to State Advisory Council to rank priority areas.	SD	April	
	1.4.4 Determine priority needs during the Spring Professional Development Conference and incorporate into training, consulting, and professional development.	All	May/June	
	1.4.5 Participate in the National Delivery System, as appropriate.	All	As needed	
Objective 1.5: Expand capabilities to assist individuals and small businesses in developing and deploying technology.				
	Strategies:			
	1.5.1 Obtain "technology" designation during the 2008 ASBDC accreditation.	SD & DD	12/2008	Output measures: • Completion of tasks • Meeting milestones
	1.5.2 Identify necessary activities and a time line for achieving the specific activities.	DD	12/2006	
	1.5.2 Each office will have at least one person attend technology training at the annual ASBDC conference to complete all modules within 4 years.	SD & DD	12/2010	Outcome measure: **
Objective 1.6: Expand capabilities to assist high growth companies.				
	Strategies:			
	1.6.1 Each office will conduct two trainings per year focused on high growth business needs.	RD	yearly	Output measures: • Completion of tasks • Meet goal
	1.6.2 Include at least one session in each semi-annual Professional Development Conference on a topic related to high-growth companies.	MM	Semi-Annually	Outcome measure: **
	1.6.3 Implement the marketing strategy to reach and assist high growth companies.	DD & All	ongoing	
	1.6.4 10% of Idaho SBDC clients are identified as high growth potential companies.	RD & DD	annually	
	1.6.5 Help meet the goals of the State Science and Technology Plan.	SD & RD	ongoing	
Goal 2: Expand and enhance partnerships to strengthen our ability to reach and assist small businesses.				
Objective 2.1: Be visible and proactive in solving the business and economic issues in Idaho's rural communities.				
	Strategies:			
	2.1.1 Continue to enhance the SBDC as business development professionals in the key community and/or vulnerable communities in each county.	RD	yearly	Output measures: • Completion of tasks
	2.1.2 Maintain close contact with the economic development professionals and collaborate in appropriate activities.	RD	yearly	Outcome measure: ** • Feedback in rural areas
	2.1.3 Each regional office will set and meet a yearly goal (to be included in their action plan) for referrals to IVI.	RD	yearly	
	2.1.4 Seek long-term funding to continue support for IVI.	SD & Jill	6/2008	
	2.1.5 Establish a direct link with the Cooperative Extension to provide business consulting in rural areas.	SD	6/2008	

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	Objective 2.2: Collaborate with SBA and their resource partners to maximize small business assistance and minimize duplication.			
	Strategies: 2.2.1 Meet with SBA and their resource partners (SCORE, WBC, BIC) on a regular schedule (to be developed by each region) to assure open communication, cooperation and minimize duplication. 2.2.2 Help SBA market and deliver training.	SD/RD Training Coord.	As scheduled As needed	Output measure: • Completing tasks Outcome measure: **
	Objective 2.3: Expand the resources of the Center using volunteers from the community, faculty members, students, and other partners.			
	Strategies: 2.3.1 Work collaboratively with other resource providers to meet the needs of small businesses interested in international trade. 2.3.2 Refer appropriate clients to the legal assistance program operated by the University of Idaho. 2.3.3 Establish a yearly goal, to be included in the regional action plans, for faculty and student involvement in SBDC programs. 2.3.4 Establish and meet a yearly goal, included in the regional action plans, for the number of mentoring sessions to be conducted during the year. 2.3.5 Ensure close coordination with the host institution to help meet the goals for the host institution and small businesses. 2.3.6 Develop stronger ties with the OSHA consultation program at BSU through routine meetings, cross-selling services, etc. 2.3.7 Achieve success in the two-year pilot of the Environmental Solutions program and pursue permanent transfer of funding to the Idaho SBDC.	All Consultants RD/SD RD RD & SD Sally and DD Sally, DD and SD	ongoing Ongoing Annually Annually Annually 6/2007 6/2007	Output measures: • Completing tasks on time • Faculty/student involvement Outcome measure: **
	Objective 2.4: Strengthen our funding and position as the primary business development organization.			
	Strategies: 2.4.1 Include a description of how the 2003 Marketing Plan will be implemented in the regional and personal action plans. 2.4.2 Do a comprehensive update of the Marketing Plan in 2007. 2.4.3 Develop funding and partnerships to expand our services to include small business regulatory assistance. 2.4.4 Develop and implement a strategy to increase funding for the program at the local and statewide levels. Increase funding by \$60,000 per year with each region having a goal of \$10,000. 2.4.5 Support the ASBDC and its efforts to increase funding for the SBDC network. Educate congressional offices about the impact of the SBDC program in Idaho and share information with key stakeholders. 2.4.6 Shift the Idaho SBDC image from assistance for startups to assistance for existing and high growth businesses. ♦ Develop a database of target audience and distribute to regions. ♦ Recruit targeted businesses ♦ Focus success stories on established and high growth businesses. ♦ Market and use assessment tool	All DD and All SD SD SD & RD 12/2008	ongoing 12/2007 12/2007 12/2007 ongoing	Output measure: • Completing tasks Outcome measure: **

Goal 3: Refine and improve our organization to increase efficiency, effectiveness, and quality.

	Objective 3.1: Meet the requirements of Consultant Certification, ASBDC Accreditation, the Operations Manual and the SBA cooperative agreement to assure consistency and quality.
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	Strategies:			Output measures:
	3.1.1 Use the Strategic Plan & ASBDC Accreditation standards to review each office annually with every fourth year being a peer review to achieve accreditation without conditions during the 2008 review.	SD & DD	Annually & 2008	<ul style="list-style-type: none"> Complete tasks Critical measures
	3.1.2 Each year, every office and every employee will develop an action plan. Regional action plans will show the regional activities planned to accomplish the goals and objectives of the Strategic Plan and region-specific activities. The plan will include specific numerical goals, list the person responsible, and a date to be completed. Individual action plans will include activities to be accomplished to achieve the Strategic Plan and Regional Action Plans, dates, and the professional development goals for the year.	All	Annually by Sept. 1	Outcome measures: ** <ul style="list-style-type: none"> ASBDC certification Training evaluations
	3.1.3 Conduct Idaho SBDC-sponsored professional development, focused on priority needs and strategic plan items - twice per year for professional staff and once per year for administrative staff.	SD & Chambers	Scheduled	
	3.1.4 Each employee will ensure that they meet the professional development certification or recertification requirements for their position on a yearly basis.	All	Yearly	
	3.1.5 Review progress on critical measures during the monthly conference call.	SD	Monthly	
	3.1.6 Conduct due diligence on all outside consultants, trainers, and presenters to assure that they are high quality and reflect a positive image on the SBDC. Take action immediately on any presenters not receiving high evaluations.	Trainers	Ongoing	

	Objective 3.2: Maintain good communication throughout the organization.
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	Strategies:			Output Measure:
	3.2.1 Conduct monthly Director's conference calls, semiannual professional development conferences, consultant meetings, and an annual Administrative Assistance conference to share information.	SD/SAA	Annually	<ul style="list-style-type: none"> Completing task on time
	3.2.2 Conduct strategic planning annually during the Spring conference and review the plan monthly during the Director's conference call.	SD	May & Quarterly	Outcome measure: **
	3.2.3 Ensure that the training, MIS, consultants, and administrative staff communicate according to the Operations Manual.	DD	quarterly	

[illegible]

	Strategies:			
	3.3.1 Survey clients' satisfaction after each session of 1 hour or more of contact time. Maintain a 50% response rate with 90% of the responses reporting above average and excellent rating.	Chambers RD	ongoing	Output measures: <ul style="list-style-type: none"> Completing task on time 50% return rate on client survey
	3.3.2 Use a third-party consultant to survey past clients to determine economic impact of Idaho SBDC services. Assure that the impact of Idaho SBDC services is equal or greater than the years before.	SD & Chambers	Annually	Outcome measures: ** <ul style="list-style-type: none"> 90% Client Satisfaction
	3.3.3 Compile results of training evaluations and use to adjust training topics, schedule, and speakers. Follow-up immediately on any unfavorable comments.	RD	April and as needed	<ul style="list-style-type: none"> Equal or greater impact

	3.3.4 Develop and implement a process for evaluating the impact of the NxLevel training program.	DD	12/2007	
	3.3.5 Survey stakeholders (universities, SBA, SBA partners) and economic development partners to determine satisfaction with SBDC.	SD/DD	yearly	
	3.3.6 Develop an incentive program for offices and/or consultants.	SD/DD	6/2007	
	3.3.7 Regions will identify (goal is 25%) and track "impact" clients. Impact from these clients will be reported in the MIS system.	RD	ongoing	
	Objective 3.4: Collect and report all required management information and determine if any additional measures are needed to make management decisions.			
	Strategies: 3.4.1 Track all non-client contacts and stakeholder contacts. 3.4.2 Review trends in measures at the end of each calendar year 3.4.3 Develop and implement a system to track client success. (Vycital, Noack, Sewell)	All SD/DD team	ongoing annually 12/2005	Output measures: • Completion of tasks on time Outcome measure: **
	Objective 3.5: Continuously improve the Idaho SBDC network.			
	Strategies: 3.5.1 Each region will set a target for piloting the video conferencing system with clients. 3.5.2 Review new technologies for their application to enhancing the efficiency and effectiveness of the Idaho SBDC network. Discuss at each Professional Development Conference and develop strategies to adopt.	RD All	12/2006 Annually	

* SD = State Director, DD = Deputy Director, and RD = Regional Director

** Overall Outcome measure: The trend in the success measures of our clients reported in the yearly impact study is level or increasing

Needs Assessment:

The needs assessment information presented below was compiled from data collected by the six SBDC regional centers, training evaluations, and surveys. It was reviewed by the Advisory Council and prioritized during the June Professional Development Conference. The Idaho SBDC will incorporate this information into delivery of services and into semi-annual professional development for Idaho SBDC staff. Each region will conduct at least two trainings in each of the areas.

Priority needs: Marketing strategies/research
Writing a business plan
Sources/access to capital
Customer service